

FINAL DRAFT

CHAPTER 7-

CONTRACTS & PURCHASE ORDERS

Properties in the U.S. Department of Housing and Urban Development (HUD) single family inventory must be maintained to ensure that they remain in good physical condition and retain their financial value. Information about HUD procurements awarded to vendors and contractors for the goods and services provided to maintain HUD's single family property inventory are tracked in the Single Family Acquired Asset Management System (SAMS). This chapter describes the steps that Marketing & Management (M&M) staff follow to record and maintain information about the procurements and track expenditures against those procurements. .

Chapter 7 contains:

7.1 - Contracts and Purchase Orders Overview

This section provides an introduction to the tasks involved in recording and maintaining information about vendor and contractor procurements awarded to maintain HUD's single-family property inventory.

7.2 - Contracts and Purchase Orders Task

This section contains illustrations and detailed descriptions of the Single Family Acquired Asset Management System (SAMS) screens accessed during contracts and purchase order processing.

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7 CONTACTS AND PURCHASE ORDERS

7.1 *Contracts and Purchase Orders Overview*

Introduction

This chapter describes in more detail the Maintain Contracts and Purchase Orders task within the Maintain Property Case Management subprocess briefly identified in **Chapter 1 – Introduction to SAMS**. The Maintain Contracts and Purchase Orders task identifies, captures, and records procurement information regarding HUD issued contracts and purchase orders for the goods and services necessary to ensure that properties in the HUD single-family inventory remain in good physical condition and retain their financial value.

This chapter describes the screens that authorized field office (M&M) staff use to:

- Record and maintain information about procurements that are awarded to vendors and contractors for the goods and services they provide to maintain HUD's single-family property inventory
- Track expenditures against those procurements made in support of property management functions.

Procurements are usually made by M&M contractors, although authorized field office (FO) employees may also initiate such purchases.

Procurement Types

There are three types of procurements recorded in SAMS:

1. A contract (which may be valued at more than \$1,000,000)
2. A purchase order (which usually does not exceed \$25,000)
3. A work order (available in SAMS in future software releases)

7.1 - Contracts and Purchase Orders Overview (continued)

Procurement Categories

A procurement may be defined as blanket or non-blanket.

- *A non-blanket procurement is for work that is completely defined (for specific cases) and for a specific dollar amount. To secure a procurement for non-blanket purchase orders, contracts, and work orders, a property case number is required.*
- *A blanket procurement is used when the scope of the contract or purchase order (P)) is unknown. Typically, the amount or the properties involved is not defined.*

Table 7-1 shows the criteria for determining whether a procurement is non-blanket or blanket.

Table 7-1 Non-blanket and Blanket Procurement Criteria

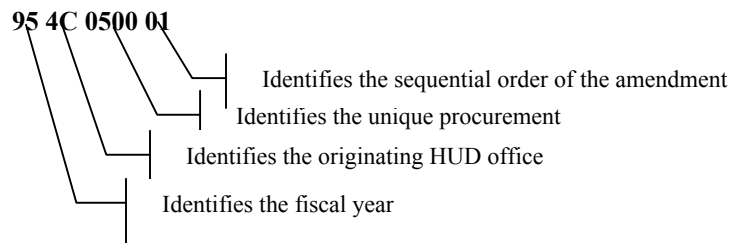
	Non-blanket	Blanket
Dollar amount specified?	Yes	No
Case number(s) specified?	Yes	No
Case number required?	Yes	No

Procurement Number

SAMS automatically generates and assigns unique procurement numbers for efficient identification. This unique procurement number, like the transmittal identifiers contained in SAMS, is comprised of four (4) distinct fields:

- Two (2) digit Fiscal Year representation (i.e., 99=1999, 00=2000)
- Two (2) character originating HUD Office Identifier (Refer to **Appendix B – HUD Office Identifiers** for a list of HUD Office identification codes)
- Four (4) digit system-generated number that uniquely identifies a procurement (begins with 00001 for each HUD office at the start of each fiscal year and is incremented by one (1) for each transmittal)
- Two (2) digit Amendment Number that identifies the current version (defaults to 01 when the procurement is created and increments by 1 for each change or amendment associated with the original procurement)

In combination, these four (4) fields uniquely and easily identify the fiscal year, HUD Office, the procurement, and its version in SAMS.



7.1 - Contracts and Purchase Orders Overview (continued)

*Line Item
Number*

For each case number specified for the procurement, a three (3) digit line item number is assigned.

7.2 Contracts and Purchase Orders Task

Introduction

The Contracts and Purchase Orders tasks identify, capture, and record procurement information regarding HUD issued contracts and purchase orders necessary to ensure that properties in the HUD single-family inventory remain in good physical condition and retain their financial value.

Procurements are usually made by M&M contractors, although authorized field office (FO) employees may also initiate such purchases.

Processing Screens

The Contracts and Purchase Orders data screens allow authorized personnel to:

- Establish procurement records for multiple work projects for a single vendor or contractor
- Establish procurement records for contracts for jobs on a case-by-case basis
- Maintain procurement information
- Track procurement work projects
- Research procurement information by payee NAID
- View historical changes made to the status of a procurement and the date of any status changes

Data/Query Screens

The data screens illustrated and described in detail in this section are:

- Non-Blanket Procurement.....PCNB
- Blanket Procurement.....PCBL

The query screens illustrated and described in detail in this section are:

- Procurement.....PCPQ
- Procurement StatusPCSQ

Note

The screens included in this document are for illustrative purposes only and reflect the menu selections and screen layouts available at the time the screen was captured. Menu or screen changes from a later release of SAMS are noted and will be documented in the next release of this document.

7.2 - Contracts and Purchase Orders Task (continued)

Menu

The contracts and purchase orders data screens are located on the Contracts and Purchase Orders Menu (LMPR), illustrated in Figure 7-1. To access the Contracts and Purchase Orders Menu (LMPR) either:

- Enter an *X* in the Sel field beside the *Contracts and Purchase Orders* option on the SAMS Data Entry Menu (LMDE) and press the <ENTER> key.
- Enter *LMPR* in the Screen field in the upper left-hand corner of a screen using the Expert mode and press the <F2> key.

Note

Refer to the **Using SAMS** section in **Chapter 1 – Introduction to SAMS** for detailed instructions on signing on to SAMS and opening the SAMS Main Menu.

S A M S		01/31/03
SCREEN: <u>LMPR</u>	CONTRACTS AND PURCHASE ORDERS	13:58:44 EST
TYPE (X) TO SELECT	SCREEN TITLE	
Q _	PCPQ PROCUREMENT	
Q _	PCSQ PROCUREMENT STATUS	
Q _ A _ M _	PCNB NON BLANKET PROCUREMENT	
Q _ A _ M _	PCBL BLANKET PROCUREMENT	
PF 2=SWITCH 4=PREV MENU 5=MAIN MENU		

Figure 7-1 Contracts and Purchase Orders Menu (LMPR) Screen

Non Blanket Procurement (PCNB) Screen

The Non Blanket Procurement (PCNB) data screen allows authorized field office staff to:

- Establish a non blanket procurement record for work that is completely defined and for a specified amount for one or more HUD properties
- Update non blanket procurement record information, as needed
- Track non blanket procurements placed for authorized contractors

Before You Begin

Gather this information before using the Non Blanket Procurement (PCNB) screen, illustrated in Figure 7-2:

- An established payee NAID
- A Procurement Contract Number (in the *query* or *modify* modes)

S A M S				
SCREEN: QPCNB_		PCNB NON BLANKET PROCUREMENT QUERY		01/31/03 13:59:47 EST
NEXT NAID: _____	PROCUREMENT: _____	0000 00	LINE NUM: 000	
HUD OFFICE NAME NAID NAME				
PROCUREMENT		*STATUS CODE: STATUS DATE		
AWARD DATE:		START DATE: END DATE:		
PROCUREMENT TYPE:		PROCUREMENT DESCRIPTION		
*COMPETITION TYPE:		*SUBTYPE: REPAIR TYPE:		
TOTAL AMOUNT:				
LINE	LINE ITEM	*POST		
OPT	NUM	CODE	*CASE NUM	AMOUNT
	DESCRIPTION			
NAID IS REQUIRED				
PF 1=HELP 2=SWITCH 4=PREV MENU 5=MAIN MENU 7=BKWD 8=FRWD 9=CLEAR				

Figure 7-2 Non Blanket Procurement (QPCNB) Query Screen

Note

The data displayed on the screens in this document are for illustration purposes only and **do not represent actual SAMS data**.

Data Screen Options

On the Non Blanket Procurement (PCNB) screen:

- To **locate (query)** a non-blanket procurement, enter *QPCNB* in the Screen field and press the <F2> key.
- To **add** a non-blanket procurement, enter *APCNB* in the Screen field and press the <F2> key.
- To **modify** a non-blanket procurement, enter *MPCNB* in the Screen field and press the <F2> key.
- To **add, modify, or delete a item line** for a non blanket procurement, enter *MPCNB* in the Screen field and press the <F2> key.

Reminder

In the Procedure Table fields which must be completed on a screen are marked as **[REQUIRED]**, fields which have a Look-up table available are marked with an asterisk (*), system-generated field entries are documented in a shaded row, and directions are provided for the various modes available on the screen.

7.2 - Contracts and Purchase Orders Task (continued)

Procedure Table Follow the instructions in Table 7-2 Non Blanket Procurement (PCNB) Procedure Table to add, modify (amend), and search for a non-blanket procurement:

Table 7-2 Non Blanket Procurement (PCNB) Procedure Table

DATA FIELD	VALID ENTRIES	DESCRIPTION
Next NAID	10 alphanumeric characters	[REQUIRED] Enter the payee NAID.
Procurement	10 alphanumeric characters Format: FY-FO-9999-99	[REQUIRED] In the <i>query</i> or <i>modify</i> modes enter the procurement contract number. <i>Note:</i> The procurement contract number is comprised of four distinct fields: (1) the first field represents the fiscal year; (2) second field represents the HUD Office code; (3) the next field is a system-assigned procurement ID; and (4) the last field identifies an amendment number (a procurement may have several amendments). Skip this field in the <i>add</i> mode.
Line Num	N/A	In the <i>query</i> or <i>modify</i> mode, enter the line item number in this field to scroll directly to the desired line item.
		System-generated; in the <i>query</i> and <i>modify</i> modes based on the entry in the <u>Next NAID</u> and <u>Procurement</u> fields. This field displays the total number of line items for the selected procurement.
Press the <F2> key.		
Result: The system retrieves and displays the available values for the fields listed here..		
HUD Office Name	N/A	System-generated; based on the entry in the <u>Next NAID</u> field.
NAID	N/A	System-generated; based on the entry in the <u>Next NAID</u> field.

7.2 - Contracts and Purchase Orders Task (continued)

Table 7-2 Non Blanket Procurement (PCNB) Procedure Table, continued

DATA FIELD	VALID ENTRIES	DESCRIPTION
Name	N/A	System-generated; based on the entry in the <u>Next NAID</u> field.
Procurement	N/A	<p>System-generated; in the <i>query</i> and <i>modify</i> modes based on the entry in the <u>Next NAID</u> and <u>Procurement</u> fields.</p> <p>After the <ENTER> key is pressed in the <i>add</i> mode, the system creates a Procurement Contract Number comprised of:</p> <ul style="list-style-type: none"> • A 2-digit representation for the fiscal year • A 2-character identifier for the originating HUD office • A 4-digit system-generated procurement identification number • A 2-digit number that identifies the sequential number of the amendment or change
*Status Code	2 alphabetic characters	<p>In the <i>modify</i> mode, enter the new status code or enter a ? and press the <ENTER> key to select an entry from the list displayed on the Lookup Screen.</p> <p>System-generated; in the <i>query</i> mode based on the entry in the <u>Next NAID</u> and <u>Procurement</u> fields.</p> <p>In the <i>add</i> mode this data field defaults to <i>OT</i> (outstanding).</p>
Status Date	N/A	System-generated; entry changes each time the entry in the <u>Status</u> field is modified. The entry in this field reflects the last date on which the status was changed.
Award Date	8 alphanumeric characters Format: mm/dd/yy	<p>[REQUIRED] In the <i>add</i> or <i>modify</i> mode, enter the date the contract or purchase order was awarded.</p> <p>System-generated; in the <i>query</i> or <i>modify</i> modes based on the entry in the <u>Next NAID</u> and <u>Procurement</u> fields. The entry in this field may be changed in the <i>modify</i> mode.</p>
Start Date	8 alphanumeric characters Format: mm/dd/yy	<p>[REQUIRED] In the <i>add</i> or <i>modify</i> mode, Enter the date the contract or purchase order starts.</p> <p>System-generated; in the <i>query</i> or <i>modify</i> modes based on the entry in the <u>Next NAID</u> and <u>Procurement</u> fields. The entry in this field may be changed in the <i>modify</i> mode.</p>

7.2 - Contracts and Purchase Orders Task (continued)

Table 7-2 Non Blanket Procurement (PCNB) Procedure Table, continued

DATA FIELD	VALID ENTRIES	DESCRIPTION
End Date	8 alphanumeric characters Format: mm/dd/yy	[REQUIRED] In the <i>add</i> or <i>modify</i> mode, enter the date the contract or purchase order ends.
		System-generated; in the <i>query</i> or <i>modify</i> modes based on the entry in the <u>Next NAID</u> and <u>Procurement</u> fields. The entry in this field may be changed in the <i>modify</i> mode.
Procurement Type	1 alphabetic character P = Purchase Order C = Contract	[REQUIRED] In the <i>add</i> mode, enter the procurement type. The entry in this field can be changed in the <i>modify</i> mode.
		System-generated; in the <i>query</i> or <i>modify</i> modes based on the entries in the <u>Next NAID</u> and <u>Procurement</u> fields.
Procurement Description	N/A	System-generated based on the entry in the <u>Procurement Type</u> field.
*Competition Type	2 alphabetic characters	In the <i>add</i> mode, enter the competition type, if applicable, or enter a ? and press the < ENTER > key to select an entry from the list of competition types displayed on the Lookup screen. The entry in this field may be changed in the <i>modify</i> mode.
		System-generated; in the <i>query</i> or <i>modify</i> modes based on the entries in the <u>Next NAID</u> and <u>Procurement</u> fields.
*Subtype	1 alphanumeric character	In the <i>add</i> mode, enter the competition subtype, if applicable, or enter a ? and press the < ENTER > key to select an entry from the list of subtypes displayed on the Lookup screen. The entry in this field may be changed in the <i>modify</i> mode.
		System-generated; in the <i>query</i> or <i>modify</i> modes based on the entries in the <u>Next NAID</u> and <u>Procurement</u> fields.

7.2 - Contracts and Purchase Orders Task (continued)

Table 7-2 Non Blanket Procurement (PCNB) Procedure Table, continued

DATA FIELD	VALID ENTRIES	DESCRIPTION
Repair Type	1 alphabetic character P = Programmed N = Non-programmed	<p>In the add mode, enter.</p> <ul style="list-style-type: none"> <i>P</i> (Programmed) for those repairs that are scheduled on the Repairs Required (CMRP) screen. <i>N</i> (Non-programmed) for those repairs that are not scheduled on the Repairs Required (CMRP) screen. <p><i>Note:</i> Refer to Repairs Required GOTO (CMRP) Screen in Chapter 3 – Case Management for an illustration and detailed description of this screen.</p> <p>The entry in this field may be changed in the modify mode.</p>
		System-generated; in the query mode based on the entries in the <u>Next NAID</u> and <u>Procurement</u> fields.
Total Amount	8 numeric characters Format: \$1234567	<p>[REQUIRED] In the add mode, enter the total amount of the non-blanket procurement for this payee (NAID).</p> <p>The entry in this field may be changed in the modify mode.</p>
		System-generated; in the query or modify modes based on the entries in the <u>Next NAID</u> and <u>Procurement</u> fields.
<p>In the add or modify mode, press the <ENTER> key to commit the information entered or modified on the top-half of the screen.</p> <p><i>Result:</i> The system response depends upon the mode at the time the <ENTER> key is pressed:</p> <ul style="list-style-type: none"> In the add mode, the system creates the record and re-displays the information on this screen in the modify mode to allow processing on the bottom-portion of this screen. In the modify mode, the system saves the changes made to the record and allows processing on the bottom-portion of this screen. In the query mode, the system retrieves and displays the available information for the fields listed here. 		
Opt	1 alphabetic character A = Add D = Delete M = Modify	<p>Enter the desired option and press the <ENTER> key:</p> <ul style="list-style-type: none"> <i>A</i> (Add) to add a new line item. <i>D</i> (Delete) to delete an existing line item. <i>M</i> (Modify) to modify an existing line item.
Line Num	N/A	System-generated; based on the number of line items entered.

7.2 - Contracts and Purchase Orders Task (continued)

Table 7-2 Non Blanket Procurement (PCNB) Procedure Table, continued

DATA FIELD	VALID ENTRIES	DESCRIPTION
Line Item Description	210 alphanumeric characters	In the add mode, enter the description of the kind of procurement work that is being done. The entry in this field may be changed in the modify mode.
		System-generated; in the query and modify modes based on the entries in the <u>Next NAID</u> , <u>Procurement</u> , and <u>Line Num</u> fields.
*Post Code	2 alphanumeric characters	REQUIRED] In the add mode, enter the post code or enter a ? and press the <ENTER> key to select a post code from the list displayed on the Lookup screen. The entry in this field may be changed in the modify mode.
		System-generated; in the query and modify modes based on the entries in the <u>Next NAID</u> , <u>Procurement</u> , and <u>Line Num</u> fields.
*Case Num	9 numeric characters	[REQUIRED] In the add mode, enter the case number or enter a ? and press the <ENTER> key to select a case number from the list displayed on the Lookup screen. The entry in this field may be changed in the modify mode.
		System-generated; in the query and modify modes based on the entries in the <u>Next NAID</u> , <u>Procurement</u> , and <u>Line Num</u> fields.

7.2 - Contracts and Purchase Orders Task (continued)

Table 7-2 Non Blanket Procurement (PCNB) Procedure Table, continued

DATA FIELD	VALID ENTRIES	DESCRIPTION
Amount	14 numeric characters Format: \$12,345,678.00	[REQUIRED] In the <i>add</i> mode, enter the amount the contractor is charging for procurement work by case. The entry in this field may be changed in the <i>modify</i> mode. System-generated; in the <i>query</i> and <i>modify</i> modes based on the entries in the <u>Next NAID</u> , <u>Procurement</u> , and <u>Line Num</u> fields.
To commit the addition or modification (amendment) of this non-blanket procurement, press the <ENTER> key. Result: <i>The system displays an error message or the successful completion message. In the add mode, a unique procurement contract ID number is assigned when the completion is successful. Once the successful completion message displays, be certain to press the <ENTER> key again to clear this message before attempting to:</i> <ul style="list-style-type: none">• <i>add another non-blanket procurement,</i>• <i>modify or amend an existing non-blanket procurement</i>• <i>exit this screen</i> Note: <i>If an error message displays, make the necessary corrections and press the <ENTER> key again to clear the error message.</i>		

Blanket Procurement (PCBL) Data Screen

The Blanket Procurement (PCBL) data screen allows authorized field office staff to:

- Establish a blanket procurement record
- Update blanket procurement record information, as needed
- Track blanket procurements placed for authorized contractors

Note

A blanket procurement is used when the scope of the contract or purchase order is not known and the dollar amount and properties (i.e., case numbers) are typically not known in advance of the award.

Before Your Begin

Gather this information before using the Blanket Procurement (PCBL) screen, illustrated in Figure 7-3:

- An established Payee NAID
- A Procurement Contract Number (in the *query* or *modify* modes)

SCREEN: QPCBL_		S A M S		01/31/03	
		PCBL BLANKET PROCUREMENT QUERY		14:01:32 EST	
NEXT NAID: _____		PROCUREMENT: ____ 0000 00		LINE NUM: 000	
HUD OFFICE NAME					
NAID		NAME			
PROCUREMENT		*STATUS CODE:		STATUS DATE	
AWARD DATE:		START DATE:		END DATE:	
PROCUREMENT TYPE:		PROCUREMENT DESCRIPTION			
*COMPETITION TYPE:		*SUBTYPE:		REPAIR TYPE:	
TOTAL AMOUNT:					
LINE	LINE ITEM	*POST			
OPT	NUM	CODE		*CASE NUM	AMOUNT
DESCRIPTION					
NAID IS REQUIRED					
PF 1=HELP 2=SWITCH 4=PREV MENU 5=MAIN MENU 7=BKWD 8=FRWD 9=CLEAR					

Figure 7-3 Blanket Procurement Query (QPCBL) Screen

7.2 - Contracts and Purchase Orders Task (continued)

Data Screen Options

On the Blanket Procurement (PCBL) data screen:

- To **locate (query)** a blanket procurement, enter *QPCBL* in the Screen field and press the <F2> key.
- To **add** a blanket procurement, enter *APCBL* in the Screen field and press the <F2> key.
- To **modify** a blanket procurement, enter *MPCBL* in the Screen field and press the <F2> key.

Procedure Table Follow the instructions on Table 7-3 Blanket Procurement (PCBL) Procedure Table to add, modify (amend), or search for a blanket procurement:

Table 7-3 Blanket Procurement (PCBL) Procedure Table

DATA FIELD	VALID ENTRIES	DESCRIPTION
Next NAID	10 alphanumeric characters	[REQUIRED] Enter the payee NAID.
Procurement	10 alphanumeric characters Format: FY-FO-9999-99	<p>[REQUIRED] In the query or modify modes enter the procurement contract number.</p> <p>Note: The Procurement Contract Number is comprised of four distinct fields:</p> <ul style="list-style-type: none"> • A 2-digit representation for the fiscal year • A 2-character identifier for the originating HUD office • A 4-digit system-generated procurement identification number • A 2-digit number that identifies the sequential number of the amendment or change <p>Skip this field in the add mode.</p>
Line Num	N/A	In the query or modify mode, enter the line item number in this field to scroll directly to the desired line item.
		System-generated; entry displays the total number of line items for the procurement.
Press the <F2> key.		
Result: The system retrieves and displays the available entries for the fields identified here..		
HUD Office Name	N/A	System-generated; based on the entries in the <u>Next NAID</u> and <u>Procurement</u> fields.
NAID	N/A	System-generated; based on the entries in the <u>Next NAID</u> and <u>Procurement</u> fields.
Name	N/A	System-generated; based on the entries in the <u>Next NAID</u> and <u>Procurement</u> fields.

Table 7-3 Blanket Procurement (PCBL) Procedure Table, continued

DATA FIELD	VALID ENTRIES	DESCRIPTION
Procurement	N/A	<p>System-generated; in the <i>query</i> and <i>modify</i> modes based on the entry in the <u>Next NAID</u> and <u>Procurement</u> fields.</p> <p>After the <ENTER> key is pressed in the <i>add</i> mode, the system creates a Procurement Contract Number comprised of:</p> <ul style="list-style-type: none"> • A 2-digit representation for the fiscal year • A 2-character identifier for the originating HUD office • A 4-digit system-generated procurement identification number • A 2-digit number that identifies the sequential number of the amendment or change
*Status Code	2 alphabetic characters	<p>In the <i>modify</i> mode, enter the new status code or enter a ? and press the <ENTER> to select a status code from the list displayed on the Lookup screen.</p> <p>System-generated; in the <i>query</i> mode based on the entries in the <u>Next NAID</u> and <u>Procurement</u> fields.</p> <p>In the <i>add</i> mode this data field defaults to <i>OT</i> (Outstanding).</p>
Status Date	N/A	System-generated; entry changes each time the entry in the <u>Status</u> field is updated. The entry in this field reflects the last date on which the status was changed.
Award Date	8 alphanumeric characters Format: mm/dd/yy	[REQUIRED] In the <i>add</i> or <i>modify</i> mode, enter the date the contract or purchase order was awarded.
		<p>System-generated; in the <i>query</i> or <i>modify</i> modes based on the entries in the <u>Next NAID</u> and <u>Procurement</u> fields.</p> <p>The entry in this field may be changed in the <i>modify</i> mode.</p>
Start Date	8 alphanumeric characters Format: mm/dd/yy	[REQUIRED] In the <i>add</i> or <i>modify</i> mode, enter the date the contract or purchase order starts.
		<p>System-generated; in the <i>query</i> or <i>modify</i> modes based on the entries in the <u>Next NAID</u> and <u>Procurement</u> fields.</p> <p>The entry in this field may be changed in the <i>modify</i> mode.</p>

7.2 - Contracts and Purchase Orders Task (continued)

Table 7-3 Blanket Procurement (PCBL) Procedure Table, continued

DATA FIELD	VALID ENTRIES	DESCRIPTION
End Date	8 alphanumeric characters Format: mm/dd/yy	[REQUIRED] In the <i>add</i> or <i>modify</i> mode, enter the date the contract or purchase order ends.
		System-generated; in the <i>query</i> or <i>modify</i> modes based on the entries in the <u>Next NAID</u> and <u>Procurement</u> fields.
		The entry in this field may be changed in the <i>modify</i> mode.
Procurement Type	1 alphabetic character P = Purchase Order C = Contract	[REQUIRED] In the <i>add</i> mode, enter the procurement type.
		The entry in this field may be changed in the <i>modify</i> mode.
		System-generated; in the <i>query</i> or <i>modify</i> modes based on the entries in the <u>Next NAID</u> and <u>Procurement</u> fields.
Procurement Description	N/A	System-generated; based on the entry in the <u>Procurement Type</u> field.
*Competition Type	2 alphabetic characters	In the <i>add</i> mode, enter the competition type, if applicable, or enter a ? and press the <ENTER> key to select a competition type from the list displayed on the Lookup screen.
		The entry in this field may be changed in the <i>modify</i> mode.
		System-generated; in the <i>query</i> or <i>modify</i> modes based on the entries in the <u>Next NAID</u> and <u>Procurement</u> fields.
*Subtype	1 alphanumeric character	In the <i>add</i> mode, enter the competition subtype, if applicable, or enter a ? and press the <ENTER> key to select a subtype from the list displayed on the Lookup screen.
		The entry in this field may be changed in the <i>modify</i> mode.
		System-generated; in the <i>query</i> or <i>modify</i> modes based on the entries in the <u>Next NAID</u> and <u>Procurement</u> fields.

7.2 - Contracts and Purchase Orders Task (continued)

Table 7-3 Blanket Procurement (PCBL) Procedure Table, continued

DATA FIELD	VALID ENTRIES	DESCRIPTION
Repair Type	1 alphabetic character P = Programmed N = Non-programmed	In the add mode, enter: <ul style="list-style-type: none"> <i>P</i> (Programmed) for those repairs that are scheduled on the Repairs Required (CMRP) screen. <i>N</i> (Non-programmed) for those repairs that are not scheduled on the Repairs Required (CMRP) screen. <p><i>Note: Refer to Repairs Required GOTO (CMRP) Screen in Chapter 3 – Case Management for an illustration and detailed description of this screen.</i></p>
		System-generated; in the query mode based on the entries in the <u>Next NAID</u> and <u>Procurement</u> fields.
Total Amount	8 numeric characters Format: \$1234567	[REQUIRED] In the add mode, enter the total amount of the blanket procurement for this payee (NAID). The entry in this field may be changed in the modify mode.
		System-generated; in the query or modify modes based on the entries in the <u>Next NAID</u> and <u>Procurement</u> fields.
<p><i>In the add or modify mode, press the <ENTER> key to commit the information entered or modified on the top-half of the screen.</i></p> <p>Result: The system response depends on the mode at the time the <ENTER> key is pressed:</p> <ul style="list-style-type: none"> <i>In the add mode, the system automatically creates the record and re-displays the information on this screen in the modify mode to allow processing on the bottom-portion of this screen</i> <i>In the modify mode, the system saves the changes made to the record and allows processing on the bottom-portion of this screen.</i> <i>In the query mode, the system retrieves and displays the available information for the fields listed here..</i> 		
Opt	1 alphabetic character A = Add D = Delete M = Modify	Enter the desired option and press the <ENTER> key: <ul style="list-style-type: none"> <i>A</i> (Add) to add a new line item. <i>D</i> (Delete) to delete an existing line item. <i>M</i> (Modify) to change an existing line item.
Line Num	N/A	System-generated; based on the number of line items entered.

Table 7-3 Blanket Procurement (PCBL) Procedure Table, continued

DATA FIELD	VALID ENTRIES	DESCRIPTION
Line Item Description	210 alphanumeric characters	In the <i>add</i> mode, enter the description of the kind of procurement work that is being done. The entry in this field may be changed in the <i>modify</i> mode. System-generated; in the <i>query</i> and <i>modify</i> modes based on the entries in the <u>Next NAID</u> , <u>Procurement</u> , and <u>Line Num</u> fields.
*Post Code	2 alphanumeric characters	[REQUIRED] In the <i>add</i> mode, enter the post code or enter a ? and press the <ENTER> key to select a post code from the list displayed on the Lookup screen. The entry in this field may be changed in the <i>modify</i> mode. System-generated; in the <i>query</i> and <i>modify</i> modes based on the entries in the <u>Next NAID</u> , <u>Procurement</u> , and <u>Line Num</u> fields.
*Case Num	9 numeric characters	[REQUIRED] In the <i>add</i> mode, enter the case number or enter a ? and press the <ENTER> key to select a case number from the list displayed on the Lookup screen. The entry in this field may be changed in the <i>modify</i> mode. System-generated; in the <i>query</i> and <i>modify</i> modes based on the entries in the <u>Next NAID</u> , <u>Procurement</u> , and <u>Line Num</u> fields.
Amount	14 numeric characters Format: \$12,345,678.00	[REQUIRED] In the <i>add</i> mode, enter the amount the contractor is charging for procurement work by case. The entry in this field may be changed in the <i>modify</i> mode. System-generated; in the <i>query</i> and <i>modify</i> modes based on the entries in the <u>Next NAID</u> , <u>Procurement</u> , and <u>Line Num</u> fields.

Table 7-3 Blanket Procurement (PCBL) Procedure Table, continued

DATA FIELD	VALID ENTRIES	DESCRIPTION
To commit the addition or modification (amendment) of this blanket procurement, press the <ENTER> key.		
<p>Result: <i>The system displays an error message or the successful completion message. In the add mode, a unique procurement contract ID number is assigned when the completion is successful. Once the successful completion message displays, be certain to press the <ENTER> key again to clear this message before attempting to:</i></p> <ul style="list-style-type: none">• <i>add another blanket procurement,</i>• <i>modify or amend an existing blanket procurement</i>• <i>exit this screen</i> <p>Note: <i>If an error message displays, make the necessary corrections and press the <ENTER> key again to clear the error message.</i></p>		

Procurement (PCPQ) Query Screen

The Procurement (PCPQ) query screen allows authorized field office, Single Family Acquired Assets Branch (SFAAB) accounting personnel, and Single-Family Post Insurance Branch accounting personnel to search for information about a procurement using the payee NAID. By using the payee NAID, information about the procurement including its description, relevant dates and dollar amounts are identified.

Before You Begin

Gather this information before using the Procurement (PCPQ) screen, illustrated in Figure 7-4:

- The contractor/payee NAID

SCREEN: QPCPQ_		S A M S PCPQ PROCUREMENT QUERY		01/31/03 14:02:24 EST	
NEXT NAID: _____		PROCUREMENT: _____ 00			
HUD OFFICE NAID	NAME NAME				
PROCUREMENT	TYPE	DESCRIPTION	START DATE	TOTAL AMOUNT	AMOUNT REMAINING
NAID IS REQUIRED					
PF 1=HELP 2=SWITCH 4=PREV MENU 5=MAIN MENU 7=BKWD 8=FRWD 9=CLEAR					

Figure 7-4 Procurement Query (QPCPQ) Screen

Query Screen Options

On the Procurement (PCPQ) screen:

- To *locate (query)* a procurement, enter *QPCPQ* in the Screen field and press the <F2> key.

7.2 - Contracts and Purchase Orders Task (continued)

Procedure Table Following the instructions in Table 7-4 Procurement (PCPQ) Procedure Table to search for or query a procurement:

Table 7-4 Procurement (PCPQ) Procedure Table

DATA FIELDS	VALID ENTRIES	DESCRIPTION
Next NAID	10 alphanumeric characters	[REQUIRED] Enter the NAID.
Procurement	10 alphanumeric characters	[REQUIRED] Enter the procurement number. To limit the list of procurements displayed, enter selection criteria in the assigned procurement ID portion of the <u>Procurement</u> field (i.e., 4-digit field three).. Note: <i>The procurement contract number is comprised of four distinct fields: (1) the first field represents the fiscal year; (2) the second field represents the HUD office code; (3) the next field is a system-assigned procurement ID; and (4) the last field identifies an amendment number (a procurement may have several amendments).</i>
<i>Press the <F2> key.</i>		
Result: <i>The system retrieves and displays the available values for the fields identified here.</i>		
HUD Office	N/A	System-generated; originating HUD office based on the selection criteria entered in the <u>Next NAID</u> and <u>Procurement</u> fields.
Name	N/A	System-generated; HUD office name associated with the HUD office identified in the <u>HUD Office</u> field.
NAID	N/A	System-generated; payee/contractor NAID based on the selection criteria entered in the <u>Next NAID</u> and <u>Procurement</u> fields.
Name	N/A	System-generated; payee/contractor name associated with the entry in the NAID field.
Procurement	N/A	System-generated; procurement contract number based on the selection criteria entered in the <u>Next NAID</u> and <u>Procurement</u> fields.
Type	N/A	System-generated; procurement type based on the selection criteria entered in the <u>Next NAID</u> and <u>Procurement</u> fields.
Description	N/A	System-generated; procurement description based on the selection criteria entered in the <u>Next NAID</u> and <u>Procurement</u> fields.

Table 7-4 Procurement (PCPQ) Procedure Table, continued

DATA FIELDS	VALID ENTRIES	DESCRIPTION
Start Date	N/A	System-generated; award date based on the award date entered on the Non Blanket Procurement (PCNB) screen or the Blanket Procurement (PCBL) screen. <i>Note: Refer to the Non Blanket Procurement (PCNB) Screen or Blanket Procurement (PCBL) Data Screen sections for a detailed description and illustration of these screens.</i>
Total Amount	N/A	System-generated; total procurement amount based on the selection criteria entered in the <u>Next NAID</u> and <u>Procurement</u> fields.
Amount Remaining	N/A	System-generated; procurement amount remaining for blanket procurements only.

Procurement Status (PCSQ) Query Screen

The Procurement Status (PCSQ) query screen allows authorized field office staff, SFAAB accounting personnel, and Single-Family Post Insurance Branch accounting personnel to search for information regarding the status of a particular procurement by using the payee/contractor NAID. This query screen is useful for finding the historical changes in the status of a procurement and the dates of the changes.

Before You Begin

Gather this information before using the Procurement Status (PCSQ) screen, illustrated in Figure 7-5:

- The contractor/payee NAID

S A M S 01/31/03 14:02:56 EST

SCREEN: QPCSQ_ PCSQ PROCUREMENT STATUS QUERY

NEXT NAID: _____ PROCUREMENT: _____ 00 STATUS _____

NAID	PROCUREMENT STATUS	ISSUE DATE	NAME	DESCRIPTION	TOTAL AMOUNT	START DATE	STATUS
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NAID IS REQUIRED

PF 1=HELP 2=SWITCH 4=PREV MENU 5=MAIN MENU 7=BKWD 8=FRWD 9=CLEAR

Figure 7-5 Procurement Status Query (QPCSQ) Screen

Query Screen Options

On the Procurement Status Query (PCSQ) screen:

- To *locate (query)* a procurement status, enter *QPCSQ* in the Screen field and press the <F2> key.

7.2 - Contracts and Purchase Orders Task (continued)

Procedure Table Follow the instructions in Table 7-5 Procurement Status (PCSQ) Procurement Table to search for or query the status of a procurement:

Table 7-5 Procurement Status (PCSQ) Procurement Table

DATA FIELDS	VALID ENTRIES	DESCRIPTION
Next NAID	10 alphanumeric characters	[REQUIRED] Enter the NAID.
Procurement	10 alphanumeric characters	<p>[REQUIRED] Enter the procurement number. To limit the list of procurements displayed, enter selection criteria in the assigned procurement ID portion of the Procurement field (i.e., 4-digit field three).</p> <p>Note: <i>The procurement contract number is comprised of four distinct fields: (1) the first field represents the fiscal year; (2) the second field represents the HUD office code; (3) the next field is a system-assigned procurement ID; and (4) the last field identifies an amendment number (a procurement may have several amendments).</i></p>
Press the <F2> key.		
Result: <i>The system retrieves and displays the available values of the fields identified here.</i>		
Status	N/A	System-generated; based on the selection criteria entered in the <u>Next NAID</u> and <u>Procurement</u> fields.
NAID	N/A	System-generated; payee/contractor NAID based on the selection criteria entered in the <u>Next NAID</u> and <u>Procurement</u> fields.
Name	N/A	System-generated; payee/contractor name associated with the entry in the <u>NAID</u> field.
Procurement	N/A	System-generated; procurement contract number based on the selection criteria entered in the <u>Next NAID</u> and <u>Procurement</u> fields.
Description	N/A	System-generated; procurement description based on the selection criteria entered in the <u>Next NAID</u> and <u>Procurement</u> fields.
Status	N/A	<p>System-generated; procurement status based on the selection criteria entered in the <u>Next NAID</u> and <u>Procurement</u> fields.</p> <p>Note: <i>If there are multiple entries, the entry in this field reflects the status of the procurement listed on the next screen.</i></p>

Table 7-5 Procurement Status (PCSQ) Procurement Table, continued

DATA FIELDS	VALID ENTRIES	DESCRIPTION
Total Amount	N/A	System-generated; based on the selection criteria entered in the <u>Next NAID</u> and <u>Procurement</u> fields.
Issue Date	N/A	System-generated; procurement issue date based on the award date entered on the Non Blanket Procurement (PCNB) screen or the Blanket Procurement (PCBL) screen. <i>Note: Refer to the Non Blanket Procurement (PCNB) Screen or Blanket Procurement (PCBL) Data Screen sections for a detailed description and illustration of these screens.</i>
Start Date	N/A	System-generated; award date based on the award date entered on the Non Blanket Procurement (PCNB) screen or the Blanket Procurement (PCBL) screen. <i>Note: Refer to the Non Blanket Procurement (PCNB) Screen or Blanket Procurement (PCBL) Data Screen sections for a detailed description and illustration of these screens.</i>
Status	N/A	System-generated; prior status for the procurement based on the selection criteria entered in the <u>Next NAID</u> and <u>Procurement</u> fields.
Date	N/A	System-generated; prior status change date for each status change listed in the <u>Status</u> field based on the selection criteria entered in the <u>Next NAID</u> and <u>Procurement</u> fields.